CA-PMM

Project Name: Business Information System (BIS)

OCIO Project #: 5225-93
Department: CDCR
Reporting Period: *From:*   *To:*

Team Member to Project Manager

Current Task Summary

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
Accomplished this week			
Planned/Scheduled Completion in Next Two Weeks			

Status Summary	Yes/No	Explanation
Will all assigned tasks be accomplished by their due date?		
Are there any planned tasks that won't be completed?		
Are there problems which affect your ability to accomplish assigned tasks?		
Do you plan to take time off that is not currently scheduled?		

Status of Assigned Issues

Issue Number	Description	Due Date	Status

CA-PMM

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CA-PMM

Project Name: Business Information System (BIS)

OCIO Project #: 5225-93

Department: California Department of Corrections and Rehabilitation (CDCR)

Reporting Period: *From:* 8/1/09 *To:* 8/31/09

Project Manager to Sponsor

Current Status Report

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	No	Integration testing of Shift Management tool has been delayed	Delay in planned Non-Productive and Productive Go Live of Shift/Time pilot for the Institutions	Complete Integration testing by end September 2009
2. Were any key milestones or deliverables rescheduled?	Yes	UAT (for Time/Shift) start is planned to start in October 2009	Non-productive and productive Go Lives for shift/time pilot will be delayed to November 2009	Ensure completion of integration testing by September 2009 so UAT can start in October 2009
3. Was work done that was not planned?	Yes	Change in the deployment approach	Additional tasks within current project schedule	Prepare relevant documentation
4. Were there any changes to scope?	Yes	Release 1C (TPA) for CPHCS has been modified from the original scope (interface to Prodagio replaced with interface with TPA system)	Planned Go Live for Release 1C/TPA is now 10/1/09	Complete scheduled project tasks related to 1C/TPA plan
5. Were tasks added that were not originally estimated?	Yes	1C/TPA related project tasks were added to meet the modified business requirements for medical invoice payments	Planned Go Live date for 1C/TPA will now be 10/1/09	Complete scheduled project tasks related to 1C/TPA plan

CA-PMM

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6. Were any tasks or milestones removed?	Yes	Project tasks (such as AD integration) related to original scope of 1C/TPA were removed and replaced by the x.y email id structural changes in the AD environment	Release 1C/TPA schedule has been modified to fit the new scope and approach	Realign new project tasks with the overall deployment schedule
7. Were any scheduled tasks not started?	Yes	Planned UAT related tasks for Shift/Time pilot were not started/completed	Delayed Go Lives for Shift/Time pilot for the institutions and delayed business benefits	Ensure completion of integration testing by 9/30/09 so UAT can be started 10/01/09
8. Are there any new major issues?	Yes	The revised BIS deployment schedule for rolling out SCM and HR functionality statewide calls for a May 2010 completion date.	End user training delivery will utilize a hybrid (distant learning, classroom training, and training lab) approach. Due to the increased number of end users in each go live and the reduced idle time between go lives, organizational, transitional, and production support related stress is likely to be high.	Proactively plan project delivery tasks and communicate with business stakeholders on performance and system adoption to mitigate change management related stress.
9. Are there any staffing problems?	Yes	4 Technical project vacancies and 3 Functional project vacancies (excluding blanket and field positions) need to be filled	Project team vacancies will impact task completion and delivery quality. The timing of the new hires will not allow for quick rampup and productivity to positively impact schedule.	Hiring activities underway. Mitigation steps include hiring of expert consultants to assist with go live activities and active knowledge transfer from IBM.

CA-PMM

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Project Manager to Sponsor

Look Ahead View

Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	Yes	The current project end date has been revised to accommodate the changed approach from functionality-based rollouts to institutional-based rollouts.	Finalize detailed, resource loaded project schedule for the remaining deployments.
2. Do any key milestones or deliverables need to be rescheduled?	Yes	Rescheduling milestones and deliverables will have an impact on the remaining schedule and completion date.	Key milestones and deliverable due dates have been revised to reflect the new approach and rollout strategy for the remaining institutional sites.
3. Is there any unplanned work that needs to be done?	Yes	Finalize resource loaded project deployment schedule based on the revised project finish date.	Internal (with the business stakeholders) and external meetings (with control agencies and OCIO) need to be scheduled to obtain necessary guidance and approvals.
4. Are there any expected or recommended changes to scope?	Yes	Release 1C scope has been modified to include interfaces to TPA system (instead of Prodagio).	Build new architecture and interfaces around the new scope.
5. Are there any tasks not originally estimated that will need to be added?	Yes	Based on the revised rollout strategy, additional tasks and milestones may need to be added to the revised schedule.	Finalize task level schedule details, assign resources, and develop an updated schedule.
6. Are there any tasks or milestones that should be removed from the plan?	Yes	Changes in tasks and deliverables will impact the current contract from a deliverables schedule as well as payment standpoint.	Realigning current project deliverables and milestones with the revised contract is currently being done.

CA-PMM

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7. Are there any scheduled tasks whose start will likely be delayed?	Yes	The revised rollout/deployment strategy will necessitate a revision to the scheduled task start dates and durations.	A revised project schedule is being finalized to indicate all the relevant details such as resource assignments, deliverable dates, and milestones.
8. Are any major new issues foreseeable?	Yes	Potential impacts on future contracts, resources, and budgets need to be addressed in the planning session.	Potential issues around integration, resource availability, and contracts need to be addressed effectively.
9. Are any staffing problems anticipated?	Yes	Additional resources may be required to support the extended deployment of the rollouts.	Acquisition of resources that align with the deployment of the remaining rollouts is being executed.

Current Status and Accomplishments:
Describe deliverables completed and milestones met during **this reporting period.**

Standard 213/215 (Contract amendments) and 810(SB/DVBE) have been implemented for Office of Business Services (OBS) end users.

CA-PMM

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Project Milestones:
List key milestones and their dates from the project schedule.

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed
Implement Forms 213/215 (Standard Agreements Summary) and Exhibit Changes (for contracts) in BIS	7/31/09	8/13/09	Completed	Minimum impact to business	8/17/09
UAT for shift/time management	7/1/09	10/1/09	In Progress	UAT delayed because of pending development work. Has caused delay in the Go Live date for Shift/Time	
Integration Testing for TPA functionality	9/1/09	9/7/09	In Progress		
Go Live with SCM functionality for 4 Northern Adults Institutions	11/1/09	11/1/09	In Progress		

CA-PMM

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Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule			X	Finalize revised Project schedule. Develop implementation schedule, resource requirements, and budget. Mini SPR for realigning schedule and deliverables is in progress.
Milestones			X	Revise project milestones based on the revised/updated project schedule for the rollouts
Deliverables		X		Deliverables for the remaining rollout implementation will have to be scheduled according to the revised project schedule
Resources		X		Project resources have to be aligned with the revised project schedule after finalizing the rollout approach
OneTime Cost	X			Budget impact/changes have to be identified to the revised project schedule and deployment approach
Continuing Cost	X			No significant changes in support costs are anticipated because of the revised project schedule

CA-PMM

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Sponsor to Executive Committee

Summary Milestones and Highlights

Project Milestones:
List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.

Milestone	Target Date	Forecast Date	Status	If Delayed, Impact to Implementation Date	Date Completed
Implement Forms 213/215 (Standard Agreements Summary) and Exhibit Changes (for contracts) in BIS	7/31/09	8/13/09	Completed	Minimum impact to business	8/17/09
UAT for shift/time management	7/1/09	10/1/09	In Progress	UAT delayed because of pending development work. Has caused delay in the Go Live date for Shift/Time	
Integration Testing for TPA functionality	9/1/09	9/7/09	In Progress		
Go Live with SCM functionality for 4 Northern Adults Institutions	11/1/09	11/1/09	In Progress		

Variances
Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".
*   *Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis*

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule			X	Finalize revised Project schedule. Develop implementation schedule, resource requirements, and budget. Mini SPR for realigning schedule and deliverables is in progress.

CA-PMM

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Milestones			X	Revise project milestones based on the revised/updated project schedule for the rollouts
Deliverables		X		Deliverables for the remaining rollout implementation will have to be scheduled according to the revised project schedule
Resources		X		Project resources have to be aligned with the revised project schedule after finalizing the rollout approach
One Time Cost	X			Budget increases have to be identified to the revised project schedule and deployment approach
Continuing Cost	X			No significant changes in support costs are anticipated because of the revised project schedule

CA-PMM

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Monitoring Vital Signs Scorecard

Vital Sign	Variance	Value	Your Score	Score Justification
1. Customer Buy-In	High Degree of Buy-In	0	**1** Yellow	The site-based deployment approach has introduced new transition issues as well as delayed realization of business benefits.
	Medium Degree of Buy-In	1		
	Low Degree of Buy-In	2		
2. Technology Viability	Strong Viability	0	**0** Green	
	Medium Viability	1		
	Weak Viability	2		
3. Status of the Critical Path (delay)	<5%	0	**1** Yellow	The site-based deployment approach has resulted in schedule slippages along the critical path and project end date.
	5% to 10%	1		
	>10%	2		
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	**0** Green	
	5% to 10%	1		
	>10%	2		
5. High-Probability, High-Impact Risks	0 to 3	0	**1** Yellow	Project risks associated with the project stem from the organizational transition requirements and business transformation related system adoption issues.
	4 to 6	1		
	>6	2		
6. Unresolved Issues (on time resolution)	On time	0	**2** Red	Issues in the project in the areas of organization transition and deployment schedule for the remaining sites will impact critical path to completion.
	Late with no impact	1		
	Late impacting the critical path	2		

CA-PMM

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7. Sponsorship Commitment	Fully engaged	0	**1**	Yellow	The new BIS sponsors are driving renewed partnership between the business stakeholders and the project team.
	Partially engaged	1			
	Inadequate engagement	2			
8. Strategy Alignment	Strong alignment	0	**0**	Green	
	Partial alignment	1			
	Weak or no alignment	2			
9. Value-to-Business	Strong	0	**1**	Yellow	Until the end-to-end solution is deployed across CDCR, the Business benefits of BIS will not be fully realized.
	Medium	1			
	Weak	2			
10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	**1**	Yellow	The vendor has gaps in the Organizational Change Management (OCM) and PM areas that have had a negative impact on the project.
	Medium	1			
	Weak	2			
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	**2**	Red	Under staffing, steep learning curve associated with SAP, and task dependencies in the schedule will have a drag effect on the team's ability to meet critical milestones.
	80-90% on time	1			
	<80% on time	2			
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	**1**	Yellow	Under staffing, under skilling, and task dependencies in the schedule will have a drag effect on the team's ability to meet critical milestones.
	80-90% on time	1			
	<80% on time	2			

CA-PMM

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13. Actual vs. Planned Resources	>90% assigned and available	0	**1**	Yellow	The timely completion of project tasks and the sustainable support of BIS is dependent on filling the current staff vacancies and skill gaps.
	80-90% assigned and available	1			
	<80% assigned and available	2			
14. Overtime Utilization (% of effort that is overtime)	<15%	0	**1**	Yellow	The aggressive project timeline necessitates about 20% overtime work to accommodate deadlines.
	15-25%	1			
	>25%	2			
15. Team Effectiveness	Highly Effective	0	**1**	Yellow	Given the complexity of the project and the high level of integration required between teams, team dynamics has a steeper learning curve and lengthy maturation process.
	Moderately Effective	1			
	Ineffective	2			
		Total	**14**	**Y**	

Green = 0 - 8
Yellow = 9 - 19
Red = 20+

Vendor Viability Rating Rationale

The Vendor's leadership and effectiveness in implementing Organization Change Management (OCM) methodologies and techniques have been low resulting in poor stakeholder management. However, with the CIO leadership of the project there has been improvements in the OCM area and increased business stakeholder engagement. Executive focus at the sponsorship level and business stakeholders have been significant contributing factors for the overall improvement in this area.